Web OTools

Standard Operating Procedures

Table of Contents

Logging in

Enter **https://otoolsweb.cnrc.navy.mil** into your web browser.
Acknowledge the warning screen
Enter your **Username** and **Password**
Click **GO**

Contact 1 Information

Record Type: Enter the record type by using the drop down menu. The following fields are to be completed by the NRD unless otherwise specified.

Active Duty Applicant	Use for applicants who would count on the active duty accession plan, i.e. 11600, 13900, 31007
Active Recall	Use for Reserve Officer who is applying for an active duty recall
Campus Data Notebook	College/university information with points of contact from various departments at the college/university
Chaplain Collegiate-19450	Once an applicant has been selected for 19450, the record type will be changed to Chaplain collegiate by the Chaplain processor for tracking purposes. HQ use only
COI//Center of Influence	Names/numbers/email address of persons who are essential to the recruiting effort
Collegiate	Once an applicant has been selected for a collegiate program (except for Chaplain), the NRC processor will change the recorder type to collegiate for tracking purposes. HQ use only
Erroneous Applicant	Contact records with erroneous applicant in the record type will be deleted from Web OTools.
Fleet	Active duty Enlisted person applying for a Active Duty Commission. HQ use only
MAVNI (Non US Citizen)	Use for applicants who are applying for one of the medical programs (DC/MC/MSC/NC) under the MAVNI (Non-US Citizen) program
Permanent Resident Alien (PRA)	Use for applicants who are applying for one of the medical programs (DC/MC/MSC/NI) under the PRA program.
Null/No Information	Record Type has not been determined
Recruiting Personnel	Names/numbers of recruiting personnel both in the field and HQ

Requesting Removal	Contact records with requesting removal in the record type will be deleted from Web OTools
Reserve DCO	Use for applicant who would count against the reserve accession plan, i.e. 21050, 31650, 51050
Reserve NAVET	Prior Navy commissioned officer

Full Name: Names must be typed in the following order using upper and lower case:
      First Middle Last   Example: John Henry Smith or John NMN Smith

** If no middle name, then put NMN where the middle name would go.
** If the person is a Jr, III, or IV, then put it just prior to the last name.
      Example: John Henry IV Smith

Last Name: This field will automatically be filled. **DO NOT TYPE** information in this field.

Status: Use drop down menu to enter status. Entered by NRD and HQ personnel as indicated below:

New Lead	Leads assigned from N@LTS
Recruiter New Lead	Lead assigned from OPO to Recruiter - NRD OPO
Lead	Recruiter has attempted contact - No response - NRD OR
Closed Lead	No more action on lead - NRD OR
Contact	Lead has responded - NRD OR
Prospect	Wants to join the Navy-working on kit - NRD OR
Applicant	Kit submitted to CNRC - NRD Processor
Attainment	Awaiting on Enlistment or Commission - HQ N315
Final Action Complete	Applicant has Final Action completed - HQ N315
RECPRO-X	Recommend withdraw of kit - HQ PM
RECPRO-X Cancel	Kit is cancelled - HQ PM or N315
Field Reject	Rejected at the field (NRD) level - NRD OPO/Processor
NRD Archive	Archived at the field (NRD) level - NRD OPO/Processor
Null	No status information – NRD/HQ
GEXX	Referral to EPO – NRD OPO

Review Level: Use drop down menu to enter review level. This field must have something in the field; otherwise, anyone can edit the information in the contact record. When the review level is at NRC N3, the field will not be able to edit.

NRD	Kit at NRD
CNRC N3	Kit at CNRC Processing
CNRC Archive	Record has been finalized/no further action

PERS 9	Kit located at Pers-9
CNRC Bin	Holding for Erroneous Applicant until it is deleted
Null	No Review Level Information

Fiscal Year: Use drop down menu to enter year that the applicant will be counted against the accession plan– dropdown has years from 2004 to 2020.

Prefix: Use drop down menu to enter suffix:

DR.	
MR.	
MS.	
MRS.	
Rank	For Fleet and NAVETS Only - Type in applicant's Rank/Rate

Program Interest: This field is populated by leads - do not place anything here.

ACBDCP//ACT BDCP
ACCCDA//ACT Chaplain Corps-DA
ACCCST//ACT Chaplain Corps-STU
ACCEDA//ACT CEC - DA
ACDCDA//ACT Dental Corps-DA
ACDCRE//ACT Dental Corps - Recall
ACDFAP//ACT Dental Corps-FAP
ACGODA//ACT Gen Officer-DA
ACHPSP//ACT HPSP
ACHSCP//ACT HSCP
ACJGDA//ACT JAG Corps-DA
ACJGST//ACT JAG Corps-STU
ACMCDA//ACT Medical Corps-DA
ACMFAP//ACT Medical Corps-FAP
ACMRCE//ACT Medical Corps - Recall
ACMSDA//ACT MSC-DA
ACMSRE//ACT MSC - Recall
ACNCDA//ACT Nurse Corps-DA
ACNCRE//ACE Nurse Corps - Recall
ACNCST//ACT Nurse Candidate Program-STU
ACNEDA//ACT NAV Reactors Eng-DA
ACNIDA//ACT NUC Power Inst-DA
ACNPOC//ACT NUCPOC-STU
GENF//Refer to Nuclear Enlist
GEXX//Refer to EPO
MAVNI// Dental Corps
MAVNI//Medical Corps

MAVNI//Medical Service Corps
MAVNI//Nurse Corps
NO4Y//Refer to ROTC
NONU//Refer to Nurse ROTC
PRA// Permanent Resident Alien
RCCCDC//RES Chaplain DCO
RCCCVT//RES Chaplain NAVET
RCDCDC//RES Dental DCO
RCDCVT// RES Dental NAVET
RCGODC//RES General Officer DCO
RCGOVT//RES General Officer NAVET
RCMCDC//RES Medical Corps DCO
RCMCVT//RES Medical Corps NAVET
RCMSDC//RES Medical Service DCO
RCMSVT//RES Medical Service NAVET
RCNCDC//RES Nurse Corps DCO
RCNCVT//RES Nurse Corps NAVET

Applicant's SSN: Use the last four numbers only. Place the full SSN in the Detail Tab labeled "Private Personal Information". The PPI detail will be explained in the Detail tab.

Mailing Address/City/State/Country/Zip: (MUST MATCH MAILING ADDRESS LISTED ON THE APPLICATION FOR COMMISSION, NAVCRUIT 1131/2, # 11.) Type in the address using upper and lower case.

Recruiter 1: Use drop down menu for recruiter username.

NRD 1: Use drop down menu for NRD.

Recruiter 2: Use drop down menu for recruiter username. This is used for "Touch and Go" recruiters.

NRD 2: Use drop down menu for NRD. This is used for Touch and Go recruiters.

Processor: Use drop down menu to indicate the NRD processor's ID who completed the officer application.

Work Phone/Cell Phone/Home Phone/Fax: Web OTools applies United States formatting to the telephone number. The telephone number must be exactly 10 digits long.

Example: (456)456-4561

E-mail Address: Type in the e-mail address of the applicant. Clicking on the word Email will automatically open your Outlook with the applicant's email there.

Contact 2 Information

FIELDS TAB

Processing Tab

Reconsideration – The Reconsideration block will be changed by N315 upon receipt of the package at NRC.

Yes
No

PERS 49- Information entered by PERS-49 only.

Approved	Pers-49 has approved for affiliation

Disapproved	Pers-49 has disapproved for affiliation
On Hold – pending action	Pers-49 has the application on hold pending further action. Will decide approve or disapprove once the action is complete

Date App Sent – Enter date the NRD forwarded the applicant from NRD to NRC. Entered by NRD Processor.

Check Boxes – This section is for NRC use ONLY. If a box is checked, an action is pending at that location. Example: Scrolls, and orders are checked. This means that the kit is waiting for approval on a signed scrolls list and waiting on a set of orders from the detailers. (All active applications at NRC N3 will have Active ODS, Active OCS or Collegiate checked until application is archived). This allows the NRD a quick look at the status of any pending actions on an applicant.

Actions Pending Notes – This section is for use by NRC ONLY. The N315 processors use this section to expand on any actions pending…ie, NRD needs COMDOCS 3-17-09.

Desig Choice 1- Use drop down menu for applicant's first designator choice. Entered by the NRD Processor.

SSP Choice 1- List of Sub-specialty codes for both Medical and Chaplain programs and NAVETS, are located in the Info Center. Use the drop down menu to identify the SSP in SSP Choice 1 field. Example: For Health Care Administrator, you would use "1800". Entered by the NRD Processor.

OOM 1- Use drop down menu to enter PQ status. Entered by HQ N315.

PQ	Applicant is Physically Qualified for Desig 1
TNPQ	Applicant is Temporary Not Physically Qualified for Desig 1
PQ with Waiver	Applicant is Physically Qualified with a Waiver for Desig 1
NPQ	Applicant is Not Physically Qualified for Desig 1
Defer	Used for NUPOC kits. They are sent to D.C. to be qualified.

ORD PRO 1 Date: Date the applicant was sent to the Professional Review Board. This date is entered by the HQ Program Manager.

Pro-Board 1- Results from the Professional Review Board. Information is entered by the Program Manager. Program Managers place a copy of the results in the applicant's record in attachment tab.

N//No	Not professionally recommended
Y//Yes	Professionally recommended
A//Alternate	Will be placed on an alternate list
X//Not BER	Does not meet the minimum requirements for designator
S//Tabled - Info Needed	On hold for additional information
T//Tabled - No Info Needed	On hold for consideration at a later date

CNRC Board 1- Program Manager will enter this information when a final decision is made.

S//Select	Applicant is a recommended selection for designator 1
N//Non-Select	Applicant is not recommended for selection for designator 1

**For Designators 2 and 3 – Enter as with Designator 1. Entered by the NRD Processor.

Scroll Submit Date- Enter the date the scroll was submitted to CNP. Entered by the HQ PM.

Scroll Approved- Once the scrolls is approved by SECDEF, the approved service (Active or Reserve) and Grade will be entered in this field…i.e. Active-ENS, Reserve-LT. Entered by the HQ PM.

To RECALL- N315 enters the date the kit is sent to RECALL (PERS).

To COMDOCS- N315 enters the date the COMDOC request paperwork has been sent to PERS-802/911.

ODS/OCS/CCPO- N315 enters the Class Start Date based on the PM's annotation under the Notes Tab.

FinSel Result- N315 enters the FinSel Result, based on the Division Officer's decision and annotation under the Notes Tab.

S//Select	Applicant is selected for Final Designator listed below
N//Non-Select	Applicant is NOT selected for the Navy

Final Select Date- Date of final selection or non-selection (Date the Select/Non-Select letter is signed). This field will not be populated until the final select/non-select letter has been signed by the appropriate Division Officer. This is entered in by NRC, N315 processor.

***For the Reserves

 - NAVET - the final select date will be the date that the applicant's final select letter is signed. (If the applicant fails to complete first drill at NOSC, they will then be considered an attrite.)

 - DCO - Final action date will be completed upon receipt of correct oath of commission, service agreement, and ready reserve agreement. This is the attainment date.

Final Action – Entered by NRD and HQ personnel as listed below.

A	Withdraw by Applicant-Reason – Entered by NRD Processor
B	Non-Select – acknowledgement of non-select by field – Entered by NRD Processor
D	Decline- Reason – Entered by N315
J	Not Enlisted/Appointment- Reason – Entered by HQ PM/Processor
L	Enlisted-Active Collegiate - Entered by N315
M	Enlisted-Awaiting OCS – Entered by N315
N	Discharged prior to reporting- Reason – Entered by HQ PM/Processor
P	Attrite – Entered by HQ PM
Q	Did not report- Reason – Entered by HQ PM/Processor
S	Enrolled – Entered by N315
T	Officer appointed – Entered by N315
Z	Reserve Affiliation - All Reserve attainments – both NAVETS and DCOs – Entered by HQ PM

FinAct Reason- A selection will be made using the drop down menu. This is entered by N315.

A	Civilian employment
B	Graduate studies
C	Selected by another service

D	Pending marriage
E	Medical
F	Deceased
G	Age
H	Length of kit process
I	Continuing Education
J	Personal
K	Other

FinAct Date- Date of Final Action. Entered by N315.

Final Desig – Entered by N315 - this should match the designator choice that is a select.

Final SSP- Entered by N315 - this should match the designator choice that is a select.

Comm/Enl Date- Entered by N315 upon review & approval of enlistment, commissioning or superseding documents - date entered it the applicant's actual commission/enlistment date.

Comm/Enl Rank- Entered by N315; based on the information provided by the HQ PM under the Notes Tab - rank the applicant either commissioned or enlisted.

Attained Date – Entered by Program Manager - date the applicant was attained (for Reserves Only).

Leads Tab

Delivery Date – Date received from NALTS.

Program Interest – Same as Contact 1 "Program Interest".

Gender – Use drop down to enter Gender. Entered by NRD OR

M	Male
F	Female

Source – Name of the source where the lead is received…i.e., NALTS, CARIT LANT, CARIT, PAC. Entered by NRD OR

Housekeeping - Use to request deletion of a record. Entered by both NRD and HQ; as applicable.

DEL	Delete this contact lead

Time to Contact - Enter either AM or PM. Entered by NRD OR

Record ID – Received from NALTS. Entered by NRD OR

Lead Disposition – Use drop down menu to enter Lead Disposition. Entered by NRD OR

Invalid or N/A
Not Interested
NBQ-Field Reject
Kit submitted
Select
Non-Select

Reason if No – Use drop down menu to enter Reason. Entered by NRD OR

A	Left message/did not return call
B	bad phone number
C	bad email address
D	Do not process/invalid

Lead eligible? Use drop down menu. Entered by NRD OR

N	No
Y	Yes

Lead Tested? – Use drop down menu. Entered by NRD OR

N	No
Y	Yes

Why not accessed – Use drop down menu to enter reason not accessed. Entered by NRD OR

A	Choose Other Service
B	Civilian Employment
C	Continuing Education
D	Not Interested
E	Continuing Follow Up
F	Previously Join USN

Why Ineligible? – Use drop down menu to enter ineligibility reason. Entered by NRD OR

A	Age
B	Physical
C	Education
D	Language
E	Citizenship
F	Failed Test / Board
G	Legal / Moral/field reject
H	NBQ per PA

Lead Accessed? – Use drop down menu. Entered by NRD OR

N	No
Y	Yes

Lead Disposition Date – Enter date of lead disposition. Entered by NRD OR

Blueprint Tab

All entries under the Blueprint Tab shall be completed by the NRD Officer Recruiter.

Citizenship – Use drop down menu to enter citizenship type.

A	US National – Non U.S. Citizen
C	U.S. Citizen
N	Non Citizen - Non-National
Z	Unknown

Date of Birth – Enter date the applicant was born.

Country of Birth – Enter country where the applicant was born

Previous Applied? – Use drop down to enter the reconsideration information.

N	No
Y	Yes

Subspecialties - Use drop down menu for the number identifier listed in Info Center under sub-specialties.

Race – Use drop down menu to enter Race.

1	AS-BLK-Natv HI/OPI-WHT
2	AS-BLK-WHT
3	AS-Natv HI/OPI
4	AS-Natv HI/OPI-WHT
5	AS-WHT
6	BLK-Natv HI/OPI
7	BLK-Natv HI/OPI-WHT
8	BLK-WHT
9	Natv HI/OPI-WHT

A	American/AK Natv
B	Asian (AS)
C	Black (BLK) or African (AF) AM
D	Natv HI or Islndr (OPI)
E	White (WHT)
F	Declined to Respond
H	AM IN/Natv (AK)-AS
J	AM IN/Natv
K	AM IN/Natv AK/Natv HI/OPI
L	AM AK-A Natv HI/OPI-WHT
M	AM AK-A-BLK-WHT
N	AM AK-AS-Natv HI/OPI
P	AM HI/OPI-WHT
Q	AM IN/NatS-WHT
R	AM IN/Natv AK-BLK
S	AM IN/Natv /OPI
T	AM HI/OPI-WHT
U	AM AK-BLK-WHT
V	AM IN/NatI/OPI
W	AM IN/Natv HI/OPI-WHT
X	AM IN/Natv AK-WHT
Y	AS-BLK
Z	AS-BLK-Natv HI/OPI

Ethnicity- Use drop down menu to enter Ethnicity.

1	Other Hispanic descent
2	US/Canadian Indian tribe
3	Other Asian descent
4	Puerto Rican
5	Filipino
6	Mexican
7	Eskimo
8	Aleut
9	Cuban
D	Indian
E	Melanesian
G	Chinese
J	Japanese
K	Korean
L	Polynesian
Q	Other Pacific Islands descent
S	Latin American with Hispanic descent
V	Vietnamese
W	Micronesian
X	Other – Not Specified

Y	None
Z	Did not respond

Foreign Language1 –Type in foreign language spoken… i.e. Spanish, French.

Foreign Lang1 Prof – Use drop-down menu.

SB	Speak Broken
SF	Speak Fluently
SFR	Speak Fluently and Read
SFRW	Speak Fluently-Read and Write

Primary Need – Use drop down menu.

Benefits	Medical-Dental-etc
Employment	Needs a job
Financial Aid	Needs money for college
Patriotism	Serve his or her country
Security	Needs stable employer
Status	Needs prestigious position

Marital Status - Use drop down menu.

A	Annulled- marriage declared null
D	Divorced- marriage legally dissolved
I	Interlocutory-final divorce pending
L	Legally Separated
M	Married- legal and common-law
S	Never Married
W	Widowed- spouse declared deceased

Dependents – Use drop down menu.

0	No Dependents
1	Spouse with or w/o minor children
2	Minor children no spouse
3	Other Dependents, not specified

Employment – Use drop down menu.

A	Unemployed

B	Full-time Employee
C	Part-time Employee

Any Issues?

No
Y//Yes-See MEDDOCS
Yes-Medical
Yes-Other
Yes-Police
Yes-Tattoo

** Select multiple entries by holding down the CTRL key while left-clicking on the entry.

Education Tab

All entries under the Education Tab shall be completed by the NRD Officer Processing Staff.

App Cum GPA- Enter Applicant's Cumulative GPA (all GPAs are to be based on a 4.0 scale).

College ID- Enter Number Identifier for College ID- List located in Info Center.

College Zip – Enter College Zip Code.

Degree Major – look in Info Center for degrees that fall into these categories, and use the drop down menu to enter the correct degree major.

0100	Agriculture and Natural Resources
0200	Architecture and Environmental Design
0300	Area Studies

0400	Biological Sciences
0500	Business and Management
0600	Communications
0700	Computer and Information Sciences
0800	Education
0900	Engineering
1000	Fine and Applied Arts
1100	Foreign Languages
1200	Health Professions
1300	Home Economics
1400	Law
1500	Letters
1600	Library Science
1700	Mathematics
1800	Military Sciences
1900	Physical Sciences
2000	Psychology
2100	Public Affairs and Services
2200	Social Sciences
2300	Theology
4900	Interdisciplinary Studies
9999	Other

Degree Type – Use the drop down menu to choose and enter the undergraduate degree type.

D	Associate Degree
G	Pro Nursing Diploma
K	Baccalaureate
X	Other

Grad School ID- Enter Number Identifier for College ID - List located in Info Center.

Grad School Zip – Enter School Zip Code.

Grad Degree Major – Same as above for Degree Major.

Grad Degree Type – Use the drop down menu to enter this information.

N	Master's
P	PHD
U	Doctorate

X	Other

Degree GPA - Enter Applicant's Degree GPA.

Degree Date – Enter the date the degree was/will be received.

Grad Degree GPA - Enter Applicant's Graduate Degree GPA.

Grad Degree Date – Enter the date the Graduate Degree was received.

Military Tab

All entries under the Military Tab shall be completed by the NRD Officer Processing Staff.

Prior Svc Branch – Use the drop down menu to enter the correct prior service branch.

2	Multiple Services
A	Army Active
B	Army Reserve
C	Army Retired
D	Navy Active
E	Navy Reserve
F	Navy Retired
G	Air Force Active
H	Air Force Reserve
J	Air Force Retired
K	Marine Corps Active
L	Marine Corps Reserve
M	Marine Corps Retired
X	Military Officer Candidate Type Training
Y	Coast Guard
Z	No Prior Service

A/D Service Date- Enter the date of Active Duty Service.

Prior Svc Pay Grade- Use the drop down menu to choose the correct prior service pay grade.

Prior Svc Length – Enter the number of full years completed.

RE Code Awarded – Look in Info Center for more information on RE Codes; and enter the correct code using the drop down menu.

RE-1
RE-1A
RE-2
RE-3A
RE-3B
RE-3C
RE-3D
RE-3E
RE-3F
RE-3G
RE-3H
RE-3K
RE-3M
RE-3N
RE-3S
RE-3T
RE-3U
RE-4
OTHER

Prior Svc DOR- Enter appropriate date of rank.

Discharge Type – Use the drop down menu to enter the type of discharge.

H	HONORABLE
G	GENERA L
OTH	UNDER O-T-H
BCD	BAD CONDUCT
D	DISHONORABLE

Discharge Date – Enter the date of discharge.

Release Date – Enter the date of release.

Total Svc Length – Enter the number of full years completed.

Cur Svc Branch - Enter by utilizing the drop down menu - same as the above for prior service.

Cur Svc Pay Grade- Enter by utilizing the drop down menu.

Cur Svc Length - Number of full years completed

Military Unit – Enter military unit applicant is currently attached.

Clearance Date – Enter the date the clearance was obtained.

Clearance Level – Use the drop down to enter the level of clearance received.

NACLC
SSBI
NAC
ENTNAC
NACI
ANACI
None

SAT/ACT Tab
(Contains MCAT,OAT,DAT and LSAT)

All entries under the SAT/ACT Tab shall be completed by the NRD Officer Processing Staff.

Scores: - Enter any required scores into the appropriate fields.

Collegiate Tab

All entries under the Collegiate Tab will be completed by the N315 processor – the field makes no entries under the Collegiate Tab.

Program – Entered by the N315 processor using the drop down menu.

BDCP
HSCP
CEC
NUPOC
CCPO

OCS/ODS Date – Start date of OCS/ODS. This is entered by the Program Manager.

Grad Date – Entered by N315.

CMR Last Rec – N315 enters the date of the last received Collegiate Management Report.

Fall 2009
Spring 2009

School – N315 enters the name of school.

Degree – N315 enters the Degree type.

GPA Cum – N315 enters Cumulative GPA.

GPA Semester- N315 enters GPA for the just completed semester.

DCP Date – N315 enters Date of Degree Completion Plan.
Med Info Pend – N315 makes entry as to whether there is medical information pending using the drop down menu.

Y	Yes
N	No

Med Info Notes – N315 enters notes regarding Medical issues.

Adv Date – N315 enters date of advancement.

Adv Reason – N315 enters reason for advancement using drop down menu.

1 Year CEC
Referral
Dean's List

Pay Grade - N315 enters the current pay grade using the drop down menu.

Coll Attrite – N315 enters attrite information using drop down menu.

Academic
Discipline

Unsuitability
Physical
Hardship
Other

Coll Attrite Date – N315 enters date of attrite.

Waiver Notes – N315 enters any notes regarding waiver.

Summary Tab

The **Summary** tab has two important fields. The first, creation, will tell you the date the contact record was created and by whom. The second field, last update, will tell you the date and who updated the contact record last.

GM & View Tab

The **GM & View** tab Is a shortcut to go Officer Recruiter website or to N3 website located on the Quarterdeck.

Contact Tab

The **Contact** tab allows the recruiter to add an additional contact to the contact record. By clicking on the NEW button, a box pops open to add the additional information.

Notes Tab

The **Notes** tab stores freeform information about the contact. The Notes tab will be used by CNRC only and will be viewable only by NRC HQ staff, Region OPO and NRD OPO.

Details Tab

Detail tab is use to add information that might be added many times, i.e. PRT scores for spring and then fall. Detail tab allows for added information without deleting the previous information.

AFIP Status	NRC use
APP PFA	Field use
ASTB	Field/NRC use

Field Notes	Field use
Incentive Status	NRC use
JPAS	NRC use
OPO Notes	Field use
Private Personal Information	Field use- **Full, 9-digit SSN** for the applicant and recruiter
Recall Review	NRC use
Reserves	Field use – location of billet information
VIP Trip	NRC use
Waiver Status	NRC use

Add a Detail

Click on Add Detail Icon:
The detail box appears. Click on the detail tab to get drop down and to choose the detail you are adding data to. A detail can be added by the field even when the record is at the NRC level.

To check information in a detail:

Under the Detail Tab you can click on the detail you would like to see. Just click the little arrow on the left side and it will expand the box to see the fields

<u>*Referrals Tab*</u>

The Referral tab is used to track lead referrals between a contact record and another. This tab is used by the field.

<u>*Pending Tab*</u>

The **Pending** tab shows all pending activities scheduled for the contact record by Web OTools user. This tab is used, and can be viewed by both the field and NRC.

<u>**To schedule a pending action on an applicant**</u>:

Select **Schedule>>Next Action**.
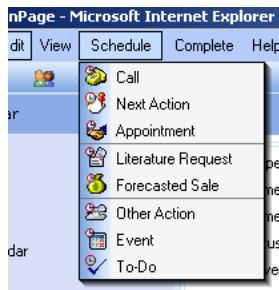
The **Schedule a Next Action** screen appears.

Primary User: Use drop down menu to find the user who will be completing this pending action.

Reference: Enter the appropriate action being requested or information that is being forwarded, i.e. Additional Info-DD370; N3M PQ Letter, etc. Specific Reference Lines **shall** be labeled as follows:

Abbreviation	Abbreviation Definition:
ADINFO-APSR	(Additional Information and Name of Information being sent) Example: Updated transcripts, DD370, etc.)
ADV-13907	(Advancement Paperwork and Designator)
*COMDOCS-29000	*(Commissioning Documents and Designator)
**CORRECTED ___	(Name of document will follow the word "CORRECTED")
DCP DTD _____	(Degree Completion Plan and Date of Plan)
*ENLDOCS-31000	*(DD Form 4 and Designator)
FALL (FY) CMR	(Semester & FY/Collegiate Management Report)
NEW KIT-13900/13700	(New Kit and Designator(s)
N3M LTR	(N3M Medical Letter)
RECON-13900	(Reconsideration Request and Desired Designator)
SEL/NSLTR	(Select/Non-Select Letter)
SPRING (FY) CMR	(Semester & FY/Collegiate Management Report)

*NOTE 1: Include the program service agreements with the ENLDOCS/COMDOCS in 1 file.

**NOTE 2: When forwarding corrected documents, you must scan and attach the entire section (per the checklist) – not just the page/form and request deletion of the incorrect section.

File Name – Click **Browse** and find the document from your computer to place as an attachment. Your file name MUST be named as follows:
Type of document-Last Name and First Initial-Last Four of SSN-Date Attached in Web OTools
Example: Example: MEDDOC-DoeJ-1234-18Dec06

Notes: Enter information to expand on reference, i.e. select letter ready to sign, Need another copy of birth certificate as the one sent was too dark. Ensure you place your name and OTools user I.D. at the end so the person receiving the pending action knows who is requesting the information.

Code: Enter NRD number (i.e. 112 for NRD Jacksonville)

Once you have entered in the above information, Click **Schedule**.
Do not worry about the other fields at this time.

You can do Next Action several times to schedule pending actions to different users.

<u>Once Pending Action is complete:</u>
You can complete Next Actions from the contact's Pending tab or the user's Activity List.
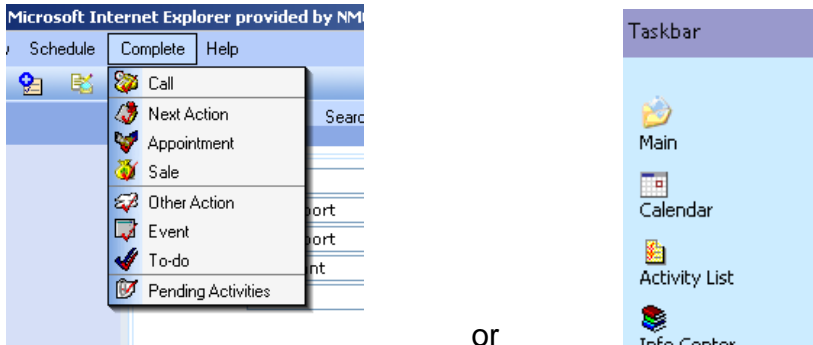
or

You can complete more than one scheduled or unscheduled activity for a contact using the **Complete Menu** screen.

<u>Select **Complete>>Pending Activities**</u>.

Select **Next Action>>OK**.
This will pull up pending actions for the applicant.

To complete a scheduled activity: In Notes field, place your comments there. Example: Attached signed Select letter, Sent requested information, Applicant will commission on Friday. Use results box to show that the action has been cancelled, completed or rescheduled.

Click **Complete.** This will save in the history tab.

**If you are in a record that you only have view rights, in order to do a pending action, you must schedule it as a call. The steps are the same but you will schedule the action

as a call instead of pending action. This will allow it to attach to the record and to the user that you are sending this pending action to.

History Tab

The **History** tab keeps a history of completed pending activities and changes made to primary fields. This log of history can not be changed or deleted. It is critical that the "Reference" section be completed when scheduling a pending action, so it will populate the "Reference" field.

Only the user making this entry should use the edit option. The next user needs to schedule a next action instead of edit or the information will be corrupted under the History Tab.

Attachment Tab

This tab shows all attachments for this applicant. Only CNRC can delete an attachment.

Attaching a Document

Click on the Attachment icon: The following box appears. Fill the following fields:

Document Name – Document name must match File Name. Your document name should be named as follows:

Type of document-Designator-Last Name and First Initial-Last Four of SSN-Date Attached in Web OTools
Example: MEDDOC-DoeJ-1234-18Dec06

Name the **"Document"** as follows:

Abbreviation	(abbreviation represents)
ACADEMIC	(Academic Information)
ADINFO-APSR	(Additional Information and Name of Information being sent)
ADV	(Advancement Paperwork)
AFFILLTR	(Affiliation Letter)
APPL	(Basic Application)
CMRDT	(Collegiate Management Report & Semester/Qtr & Yr)
COMDOCS	*(Oath and Program Service Agreement; to include the HPLRP Agreement, if applicable)
CORRECTED _____	(Corrected document, include document name following the word "CORRECTED")
DCPDT	(Degree Completion Plan & Date)
ENLDOCS	*(DD Form 4 and Program Service Agreement)
JPAS CORRECTED ___	(Corrected JPAS Information and Date)
MISC	(Miscellaneous Documents)
N3M LTR	(N3M Medical letter)
ORDRESP	(Active Duty Orders & Responsibility Letter)
PRIOR SVC	(Prior Service)
PROFESSION	(Professional Information)
NUCDOCS	(Nuclear Program Documents)
RECON	(Reconsideration Request)
SEL/NSLTR	(Select/Non-Select Letter)
WELCOME	(Welcome Letter)

*NOTE: The designator **shall** be placed in the front of the reference line when sending enlistment/commissioning documents and service agreements to N315.

Example: 19754-COMDOCS-JonesJ-1234-02Apr09 (or) 13900-ENLDOCS-JonesJ-1234-02Apr09

Document Owner – Use the drop-down menu to ensure the document goes to the correct individual – DO NOT TYPE THE USER CODE.

- **Public** - this allows the document to be viewed by all Web OTools users. If any document contains a Full SSN, it should NOT be made public.
-
- **CNRC** - Only NRC can view the document. Any documents that contain a Full SSN on it, must be NRC.

**This is a security feature. It is necessary to make sure the applicant's SSN is protected!

Notes – Any additional information that needs further explanation can be placed here. <u>You must include your name and OTOOLS user ID code.</u>
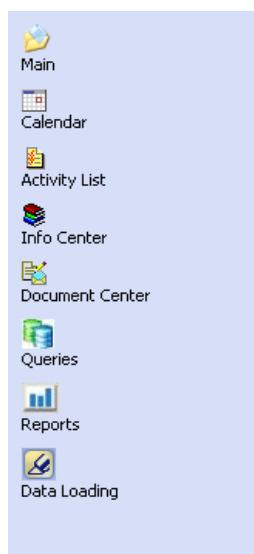
File Name – Click **Browse** and find the document from your computer to place as an attachment. Your file name MUST be named as follows:
Type of document-Last Name and First Initial-Last Four of SSN-Date Attached in Web OTools
Example: Example: MEDDOC-DoeJ-1234-18Dec06

Click **OK**

**Attachments in Web OTools shall be PDF.

Task bar

<u>Main</u> - Brings you to the Main page

<u>Calendar</u> –Pending actions will show by date and time

<u>Activity List</u> - Will take you to your pending actions. Click on Name to go to the contact record.

<u>Info Center</u> - Contains information such as Board dates, Sub-Specialty lists, School Codes, etc.

Document Center - This document center will be used at a later date to merge forms with Web OTools contact information

Queries – Queries can be executed and exported into excel.

Can choose from Global Saved Queries where you choose one query from the drop down and click **Execute Query**. Or you can choose from My Saved Queries

Click tab **Build Query** to build your own query.

Select Table: the drop down allow you access different tables.

Choose **General>>All Contact (C1,C2)**
This will give you all the fields that we add data on applicant. Just click on the fields you want displayed.

Once you have selected the fields to be displayed, go to **Insert Record Logic.**

Data Field: Choose the logic.

Value: Example would be NRD number

And: If you use more than one logic, you can narrow the field by saying you want both logics in order for the record to display. Example: I want records from NRD 102 that are applicants. So only the records that fit both logics will display.

Or: If you want a record to display that meets either logic, then use OR. Example: I want records from NRD 102 and NRD 104. This would give me all records from both NRDs. Had I used AND, I would not see any records since an applicant can not be from both NRDs.

Once you have your query, you can name it. You can also save to a disk or send it to your desktop in an excel spreadsheet. You exported to an Excel spreadsheet by clicking on the green button ⬜ with the MS Excel symbol near the upper right corner.

Reports - These are CNRC reports

Data Loading – CNRC these tables for loading OCS classes.

Recently Viewed Tab

▼ **Recently Viewed** Joshua E Inks() Ifeanyi Emenike Izuakor() Hermie P Ilagan() Brian David Inglis() Jonathan M Ashton() Melissa Ashmore() Matthew J Adamo() Matthew C Anderson() Marlo Bryan Anderson() Mark Emery Archer()	Recently Viewed: This list shows that last ten records that you have viewed. This allows quick access to them. Once you get to ten names, it will automatically drop off the oldest record.

Logging Out

Click icon: Clicking on icon will log you out of Web OTools. If Web OTools sits idol for more than 20 minutes, it will log you out automatically.
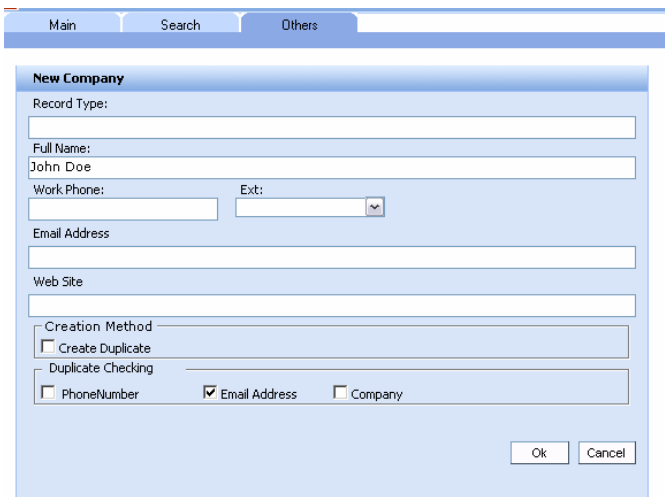

Working in Web OTools

Creating New Contact Records

Select **File>>New Contact or use New Contact icon** .

This screen will open.

Add only the following information:

Full Name: Type name in the following format using upper and lower case:
        First Middle Last   Example: John Henry Smith

** If no middle name, then put NMN where the middle name would go.
** If the person is a Jr, III, or IV, then put it just prior to the last name.
        Example: John Henry IV Smith

Email Address: If you have an email address for the applicant. Place it in this box as this will be the avenue to search for duplicates.

Click **OK**

The Full Name and Email will automatically fill the field on the MAIN tab.

Start with Record Type and start filling in the fields.

All fields applicable to the applicant are required to be completed. Entries will be matched against the applicant's application paperwork (i.e.: Application for Commission, SF86, etc.).

Required Fields

ALL FIELDS APPLICABLE TO THE APPLICANT'S INFORMATION ARE REQUIRED TO BE COMPLETED PRIOR TO SUBMISSION OF THE KIT TO NRC.

In addition to the above, the following fields are **required by NRC** to have been completed prior to archiving a kit:

ORD PRO Date 1, 2, 3	Processing tab
PRO Board 1, 2, 3	Processing tab
CNRC Board 1, 2, 3	Processing tab
FinSel Results	Processing tab
FinSel Date	Processing tab
Final Action	Processing tab
FinAct Reason	Processing tab
FinAct Date	Processing tab
Final Desig	Processing tab
Comm/Enl Date	Processing tab
Comm/Enl Rank	Processing tab
OIS/OCS/CCPO Date	Processing tab
School (collegiate)	Collegiate tab
Degree GPA (collegiate)	Collegiate tab

Editing Applicant Information:

You can update an applicant's information whenever the information changes or new information is available. Position the mouse cursor inside the field you want to edit and then click to activate a cursor. You can also click on the arrow to choose from the drop down.

The data that you place in an applicant's field is going directly onto the server.   There is no "go back" arrow. You will have to edit/update the information it you make a mistake in the record.

Searching for Applicants

Go to the Search Tab (middle tab at the top).

Enter **your NRD number** in NRD1 field located top right.   Example: Enter 102 in the NRD1 field for NRD New England.

You can narrow your search by filling in more fields. Example would be to also have Active Accessions in Record type.   This will give NRD New England all their Active Accessions.

Once you have made your selection**,** click **Search.**

Your applicants will be listed below the blue line. Click on the name and the applicant's contact information will come onto the screen.

Click on the Search tab when you want to go back to the list of names.

Hit **Reset** when you want to change your search criteria.

Communication between WOT Users

Pending actions will replace emails and will keep a running history of the applicant's kit. How to do a pending action is listed under the pending tab

Submit a Kit to NRC

Once you have filled out the required fields that pertain to your applicant and attached all the documents that need to be forward, you will need to:
1 - Do a pending action to your processor with the words "New Kit" in reference.
2 - Change the **status** from Prospect to Applicant in contact 1.
3 - Change the **review level** from NRD to NRC N3 in contact 1.

Status | Applicant   ▼ | Fis
Review Level | CNRC N3   ▼

****Once you have changed the review level to NRC, you will not be able to change the information in the kit.** You will be able to attach more documents if needed. One document that will attach at a later date is Commission/Enlistment documents. As the system will also act as a residual file, you would want to make sure all documents that you would keep in an applicant's residual file is attached in Web OTools.

****Send a pending action** regarding the submission of the applicant. You shall use the drop-down menu to choose the appropriate NRC's processor username in the primary user field when creating a new pending action.

NAVET Status Check/Submitting Kit

Requesting a Status Check from PERS-4911 will require a pending action.

1. Create a new pending action with the primary user as **PR490001 (status check).**

2. In reference, type in the word status check and then the last four of SSN.
   Example: **Status Check-1234**

Pers-4911 will require the following fields to be completed in order to do a status check. At the same time, all attachments should be added.

Full Name	Contact 1
Rec1	Contact 1
NRD1	Contact 1
App SSN	PPI Detail

Once PERS 4911 has completed their Status Check and the kit is ready to go to CNRC, the field will do a pending action to **PM310007,** change the status to **Applicant**, and last, change the review level to **CNRC N3**. PM310007 is the Program Manager/Processor for all NAVET kits.

LEADS

Leads will be placed into Web OTools from various places: Cyberspace, Diversity and NRAMP. Leads are sent to the OPOs to distribute to the recruiters in their NRD. Following are the steps to find leads and distribute:

For OPOs:

Select **Search tab**.
Once you are in the Search Tab, select "your NRD" in the NRD1 Field and select "New Lead" in the status field. Click **Search.**

Once your list appears, click on applicant name to open the contact record. Once you have looked at the contact information, assign the contact record using the Recruiter 1 dropdown. Click on Search Tab to go to the next contact record.

For Recruiters:

Select **Search tab**.
Once you are in the Search Tab, select "your user ID" in the Recruiter1 Field and select "Recruiter New Lead" in the status field. Click **Search.**

Once your list appears, click on applicant name to open the contact record. Click on Search Tab to go to the next contact record.

After contact with the applicant, change the status to lead, contact, prospect or closed lead depending on the response that you receive.

Deleting Kit Prior to becoming an Applicant

This kit has not been sent to NRC. This is used when the status is Leads, Contacts and Prospects. This will delete the kit permanently.

Leave **Record Type** and **Review Level** alone

Change **Housekeeping** (located in Leads tab) **>> Delete**

Deleting Kit once it becomes an Applicant

**This kit has been sent to NRC, only NRC will do these procedures
**This will delete the kit permanently.

Change **Record Type>> Erroneous Applicant**
Change **Review Level >> CNRC Bin**
Change **Housekeeping** (located in Leads tab) **>> Delete**

Help Desk Support

For system support: VMI
                             07:30 to 17:30 EST
                             Email: navysupport@vermar.com
                             Phone: 703-659-1366

For Application support: NRC
                            07:00 to 18:00
                            901-874-9355

**NOTE: To obtain a user account, a Footprints ticket is required. Complete and forward to N6. In addition, when an OTools user transfers, the NRD shall submit a Footprints ticket to have the account released.